

Logging in to EflexOnline

To access your **eFlexOnline** (also referred to as the **Employer Site**) account navigate to: <https://eflexonline.com>

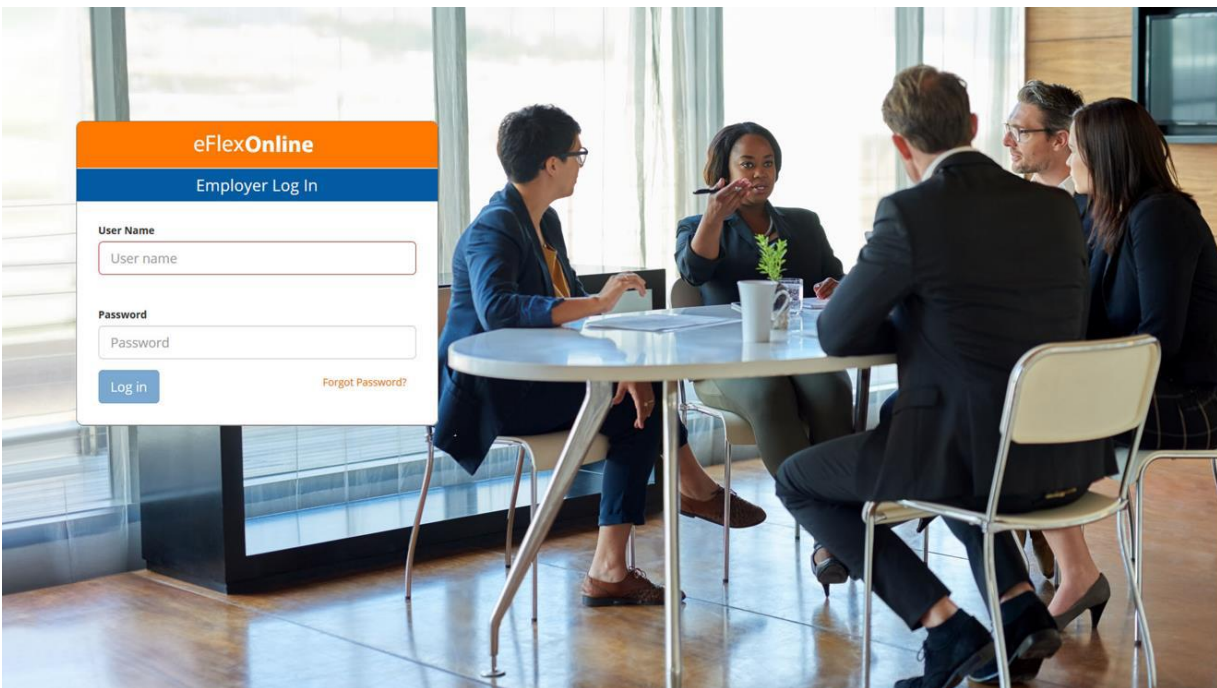
Your username, and randomized single-use password, will be provided to you when your company is created within the system via secure email when your group was created. If you did not receive this email, please contact **BMS LLC**.

Your password is case sensitive. If you cannot remember your password, you may request a password reset by clicking **“Forgot Password?”** in the lower right-hand corner of the site window. The system will then ask you to confirm your username. Upon confirmation, an email will be sent to the address on file for that account with a time sensitive temporary password.

NOTE: After three unsuccessful attempts the account will be locked for five minutes before you can try again. Please be sure you are using one of our supported browsers.

For the best **EFO** viewing experience, we recommend one of the following Internet browsers:

- Microsoft Internet Explorer 11 or greater
- Mozilla Firefox 8 or greater
- Google Chrome 16 or greater
- Apple Safari 4 or greater



**Please note, this site has an inactivity timeout for security purposes. After 20 minutes of no action the site will log you out.*

Two-Factor Authentication

To validate that the account holder is the one accessing the account, you may be asked for a PIN (unless you have previously registered the device). If you have not registered the device, or this is your first time logging in, a special PIN will be sent to the email address on file. Please note, this is case sensitive and will expire within **15** minutes. You may choose to register the device to bypass this step in the future. We recommend to **never** register publicly accessed devices. Once logged in, you can choose to clear any remembered devices.

PIN Confirmation

Please enter the PIN sent via the email address associated with your account.

PIN

PIN required

Save time by registering your computer

Would you like this system to remember this computer or device? If you select yes, you will not need to reauthorize this computer or device in the future.

There is no limit to the number of computers and devices that can be remembered for your account.

Haven't received your PIN email or the PIN is not working? [Send me a new PIN.](#)

If you no longer have access to the email address that is on file with your account, please contact **BMS LLC** or another administrative user that has access with your new preferred email.

Managing your account

Once you are logged in, you can manage your account, clear your remembered devices and change your password.

Resetting your password

To change your password, select the drop-down arrow next to your name and company. Select **“Change Password”**. You will be required to enter your current password and confirm your new password. **Requirements:** Your password is case sensitive and must be an alphanumeric string (any combination of Uppercase, lowercase, numeric or symbols (!@#\$%^&*()_-.)) with or without spaces). One Uppercase letter and one numeric character are required. The length of the password is minimum of 6 characters. There is no restriction for maximum number of characters.

Access

Admin users will have the ability to make changes within the site. Non-admin users will have **read-only** access and may be restricted from certain areas of the site.

Dashboard

The **Dashboard** landing page provides users with a quick glimpse into the statistics of each benefit plan offered. It also provides insights into election amounts and **participant accounts**. You may also access the **Dashboard** from your toolbar.



You will note that the plan(s) spend-by (**Use it**) dates are listed. This will be the date employees have to **incur** medical expenses. The **claim it** by date is the deadline for employees to submit these claims for payment, this is also known as a **run-out**. Run-out claims **must** be submitted manually, regardless of plan type. Employees must also provide proper documentation to verify the charge was legitimate and occurred on or before the **use it by** date. Once this date has passed, no further claims will be reimbursed from this plan year.

Dashboard reports

If you select "**View Plan Details**" the site generates a pre-filtered year-to-date report in .PDF format for download. The enrolled participants graph on the **dashboard** reflects participants with an election *greater than \$0*.

Employee Search

On the left-hand corner of the page you will be able to quickly search through the employees enrolled into the plan. Type an underscore (“_”) to view a list of up to 75 records. Employees with a **GRAY** icon are **ACTIVE** and employees with a **RED** icon are **TERMINATED**.

The screenshot shows the EFlexOnline interface for 'Careful Health Automated Test (913) 111-1111'. The search bar on the left contains 'Mel' and shows two results: 'Yahtest, Meltest B' (Employee Number: BCD445566) and 'Yodtest, Meltest' (Employee Number: JJJ-21-0111). The main content area is titled 'Current Year Benefits' and features a blue card for the 'FSA - Adoption Assistance Plan' for the 2018 Plan Year (Jan 1, 2018 through Dec 31, 2018). The card displays a total election amount of \$1,300, participant savings of \$390, and employer savings of \$99. It also shows a comparison of enrolled participants: 0 in the previous year and 2 in the current year. A 'View Plan Details' link is visible at the bottom of the card.

Employees are searchable by their **SSN** (social security number), **EIN** (employee identification number, or by a **portion of their name**). The “**More Detail**” link expands to show additional employee identification numbers, employee addresses, pay cycles and any special department codes. Clicking on the employee’s name will bring you to their **page**.

The screenshot shows the expanded search results table. The table has the following columns: Employee Name, Employee Number, SSN, Department, Pay Cycle, and Address. The data rows are as follows:

Employee Name	Employee Number	SSN	Department	Pay Cycle	Address
Yahtest, Meltest B	BCD445566	****5566	EXECUTIV	SEMIMONTHLY	4200 W 115th St, Ste 300 Leawood KS 0...
Yodtest, Meltest	JJJ-21-0111	****0111		SEMIMONTHLY	4200 W 115th St, Ste 300 Leawood KS 0...

Actions

From the **Actions** menu you can navigate to portions of the site that allow you to manage your employees, benefits, and claims. For those who have **read-only** access, you will not be able to utilize these features. If you feel you should have greater access, please contact **BMS LLC**.

Add an employee

Administrative users can submit employee updates online in real-time without requiring the review and approval of such changes by **BMS LLC**. If you do not have the ability to manage employees, but feel that you should, please contact **BMS LLC**.

From the **Actions** dropdown menu select “**Add an Employee**”.

The screenshot shows the 'Add New Employee' form in the Careful Health system. The form is titled 'Demographic Information' and includes the following fields:

- First name (required, with a red border and error message 'First name is required.')
- Middle initial (optional)
- Last name
- Date of birth (with a calendar icon)
- Employee number
- Social security number (format: ### ##-####)
- Pay cycle (dropdown menu)
- Hire date (with a calendar icon, value: 08/20/2018)
- Department (optional, dropdown menu)
- Email address (optional)
- Phone number (optional, format: () - - - - -)
- Fax (optional, format: () - - - - -)
- Address
- Address 2 (optional)
- City
- State (dropdown menu)
- Zip

At the bottom of the form, there are two buttons: 'Add New Employee' and 'Cancel'. The left sidebar shows 'New Employee' and 'Demographics' options. The top navigation menu includes 'Dashboard', 'Actions', 'Debit Card', 'Reports', 'Forms', 'About', and 'Log Out'.

You will be prompted to add the account holder’s demographic information. Unless noted otherwise, all fields are required. Click “**Add New Employee**” to ensure that the new employee is added. Once saved the menu on the left will update with new options for the employee’s account. You can return to this page in the future to **edit the employee’s information** to keep them up-to-date.

When a participant’s termination date is removed from the portal, the **employer site** verifies if there are any participant or dependent benefit elections that have a matching termination date. If there are, then the **employer site** will remove the matching benefit election termination dates for all participant and dependent benefits. Benefit elections with termination dates that do not match the employee termination date being removed, will persist and remain terminated.

Debit Card

From the menu on the left-hand side debit cards may be maintained for the selected individual. A reason must be provided to suspend or enable a card. New cards are mailed and generally received within 7-10 business days.

Debit Card Details

Davtest L Brutest

Card status: Active
Card number: 489600
Card request date: 02/02/2
Card issue date: 02/05/2
Card activation date: 02/02/2
Card expiration date: 02/28/2
Date of last status change: 08/08/2016
Reason for last status change: Reactivate

Employee does not have any elections that extend beyond their current card expiration date.

Suspend Debit Cards

Suspend Cards

You are about to suspend the debit cards for Davtest L Brutest. Click 'OK' to suspend cards or 'Cancel' to exit without suspending cards.

Before a card(s) can be suspended a reason must be included

Suspend Card

OK Cancel

Debit Card Details

Product Update

Card status: No card or request
Card number:
Card request date:
Card issue date:
Card activation date:
Card expiration date:
Date of last status change:
Reason for last status change:

Request a Debit Card

Request a new employee card.

Request debit card during benefit eligibility and enrollment periods.

A reason must be provided to suspend or reactivate a card.

You will also be prompted to request or decline the issue of new debit card if you are enrolling a participant for the first time. You may also request debit cards in mass for participants.

Election Added

The election for FSA Medical Account was successfully created.

Would you like to request a debit card for this participant?

Request Debit Card Decline Debit Card

Request Card(s)

You are requesting a debit card for davtest l brutest.

To request a second card in addition to the primary card, please check the box and enter the secondary card holder's name below.

I would like to request an additional card.

Secondary card holder name

First name MI Last name

Request Cards Cancel

You may also request a secondary card as well.

You may also request a secondary card as well.

Enrolling dependents

To add a dependent, select the **Dependent** option from the menu on the left. On the **current benefit elections** page, you will individually add the dependents to their respective benefit account that they are participating in.

Careful Health Automated Test edit name (154) 252-5632 Dashboard Actions Debit Card Reports Forms About Log Out

Employee Search
lbru SSN or EIN
4 records match your search criteria
Show Search Results

Brutest, Davtest L
4200 W 115th St, Ste 300
Leawood, KS
Social Security Number: ****0001
Employee Number: FFF440001

Demographics
Debit Card
Dependents
Direct Deposit
Leave of Absence
Insurance Plans
Current Benefit Elections
Future Benefit Elections

Menu location.

Dependents

Davtest L Brutest

+ Add a new dependent

Koetest W Brutest

First name: Koetest Middle initial (optional): W Last name: Brutest

Social security number: ***-**-3327 Dependent ID: 555-44000101 Date of birth: **/**/####

Relationship: Spouse or Common law partne Gender: Male Date of birth: 01/01/1970

Address 1: 1901 W Tomichi

Address 2 (optional):

City: Gunnison State: Colorado Zip code: 81230

Marital status: Not Specified Student status: Not Specified Employment status: Not Specified

Save Koetest W Brutest Cancel

Direct Deposit

From this screen administrators will have the ability to toggle the banking settings for an individual. The banking information is also accessible on the participant level within their account. We recommend having the participant update their information if possible. The changes made on this page are immediate. Please be very careful with your entry to avoid any return of reimbursements for the participant.

Careful Health Automated Test edit name (154) 252-5632 Dashboard Actions Debit Card Reports Forms About Log Out

Employee Search
lbru SSN or EIN
4 records match your search criteria
Show Search Results

Brutest, Davtest L
4200 W 115th St, Ste 300
Leawood, KS
Social Security Number: ****0001
Employee Number: FFF440001

Demographics
Debit Card
Dependents
Direct Deposit
Leave of Absence
Insurance Plans
Current Benefit Elections
Future Benefit Elections

Menu location.

Direct Deposit ACH Settings

Davtest L Brutest

ACH is enabled
Transit number: ****3317
Account number: ****4567
Transaction description: Savings Deposit

Turn ACH Off Update Transit and Account Information

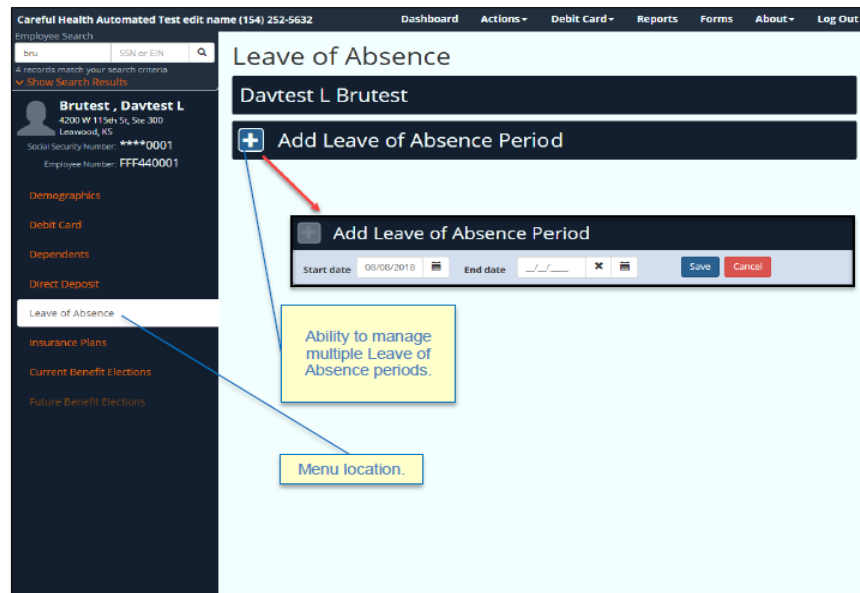
Ability to turn on or turn off ACH Payments with real-time updates.

ACH is not currently enabled
Transit number: ****3317
Account number: ****4567
Transaction description: Savings Deposit

Turn ACH On Using Current Account Information Turn ACH On and Enter Account Information

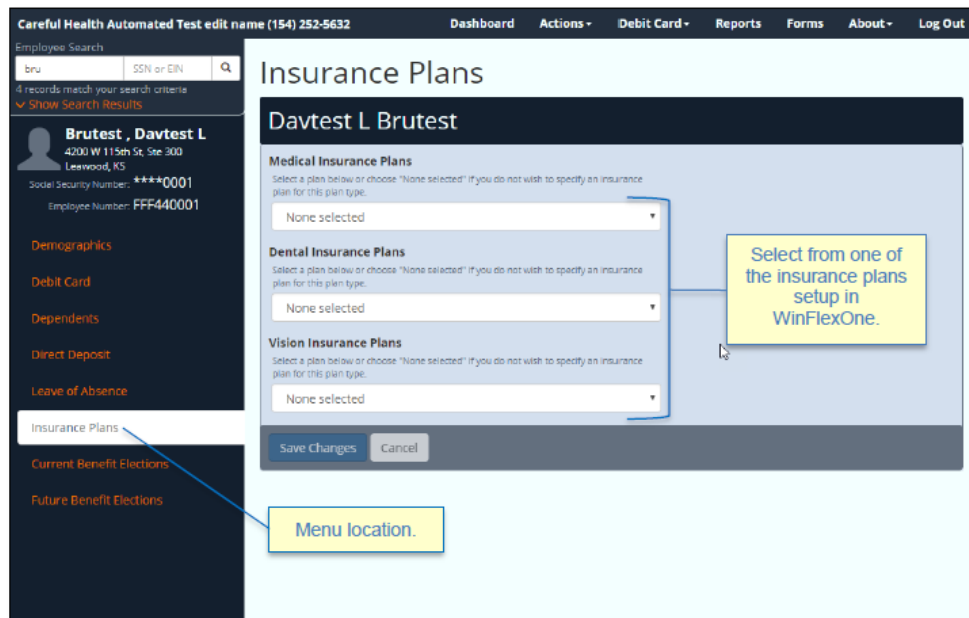
Leave of Absence

If an employee takes a leave of absence, or experiences a gap in coverage, you may note it on the employee's profile. The system could maintain multiple leaves of absence. No claims will be processed between the dates listed.



Insurance Plans

To utilize the debit card to its full potential, the participant should be enrolled in their applicable company **insurance plans**. Select the appropriate plan(s) from the drop down and then save changes. If you notice a plan is missing, or not listed correctly, contact **BMS LLC**. By assigning an **insurance plan** to the employee it will assist in the auto-approval of **Copays** as defined by your **Copay list**.



Current Benefit Elections

From this page you will enter the annual election during enrollment or make changes if the employee experiences a qualifying life event. If applicable, please also be sure to enroll the participant into an **insurance plan**. An election will need to be added before the employee may have any claims processed. **Be careful to enter enrollment based on the employee's effective date and the number of pay periods left in the Plan Year. Incorrect entry could cause issues with funding and participant's accounts.**

If the participant also has dependents and the plan requires them to be listed, you will need to assign them to the associated plan. Select the plan you wish to enroll the dependent. On the right-hand side of the page you will see a list of dependents that you can add or remove to the benefit as needed. If you do not see the dependents you wish to enroll you can **add the dependent** to update real-time. Make sure dependent information is entered for all HRA Plan entries for proper tracking of covered enrollments.

For changes made outside of the plan's open enrollment period you will be **required** to enter an election change reason. These reasons must be accepted qualifying life events in the eyes of the IRS. If the change is being requested for the future, it is considered **pending**. You can review the pending changes by viewing the details.

	Current Values	Pending Values
Election Attributes		
Eligibility date	01/01/2018	01/01/2018
Election termination date		
Current annual election amount	\$1500.00	\$1600.00
Pay period amount	\$62.50	\$65.00
Employer portion	\$0.00	\$0.00

Current Year Benefit Elections

FirstName LastName

Elected Benefits

Advanced HRA - Unreimb...
Electing \$1,250.00 annually

Available Benefits

Advanced HRA - Unreimb...

Advanced HRA - Unreimb...

FSA - Adoption Assistance...

FSA - Dependent Care

Advanced HRA - Unreimbursed Medical Election

HRA Benefit Attributes

Coverage tier

Family

Add/Remove dependents from the benefit.

Assigned HRA Dependents

Assigned dependents

Unassigned dependents

ChildTest Test - Child or Other e

Select a dependent and then use the left and right arrows above to move them between the Unassigned dependents and Assigned dependents lists.

Add a new dependent

Coverage Amounts

Benefit Level 1

Combined coverage amount (Max: \$3,000)

\$1250.00

Combined deductible amount (Max: \$1,500)

\$1500.00

Per-person deductible amount (Max: \$500)

\$500.00

An individual's claim may be paid once their per-person deductible is met.

For AHRA plans this denotes the coverage and deductible tiers.

Election Attributes

Eligibility date 08/15/2018

Election termination date --/--

Annual coverage amount \$1250.00

Election change reason None

Election change reason is required.

Per period amount \$250.00

Employer portion \$250.00

Change effective date 08/21/2018

Update Election

Cancel

Required.

Save your changes!

Add Current Year HSA Election

From EFO you may request a new HSA (*Health Savings Account*) account if the employer offers the benefit through **HSA Bank**. (Other Custodian Banks must be submitted manually to BMS LLC for processing.) You will begin by selecting benefit from the **Available Benefits** list. Follow the prompts to add this benefit. **IMPORTANT: Please note, a true social security number must be provided in the employee profile when enrolled in accordance with the Patriot Act. You must provide an email for all account requests. Also, the ID can be a Drivers Licenses or Passport # for requesting account.**

Careful Health Automated Test (154) 252-5632

Dashboard Actions Debit Card Reports Forms About Log

Employee Search
tru SSN or EIN

4 records match your search criteria
Show Search Results

Brutest, Davtest
4200 W 115th St, Ste 300
Leawood, KS
Social Security Number: ****0041
Employee Number: FFF440041

Demographics
Debit Card
Dependents
Direct Deposit
Leave of Absence
Insurance Plans
Current Benefit Elections

Current Year Benefit Elections

Davtest Brutest

Elected Benefits

- FSA Medical Account
Electing \$1,500.00 annually
- HRA - Comprehensive
Electing \$6.98 annually
- FSA - Adoption Assistance...
- FSA - Dependent Care

HSA Election

Election Attributes

Eligibility date: 01/01/2018

Annual election amount: \$2500.00

Pay period amount: \$104.16
Pay period amount should be greater than zero.

Request HSA account:

Add Election Cancel

Add HSA Bank election and request an account online.

Request an HSA Bank Account.

Careful Health Automated Test (154) 252-5632

Dashboard Actions Debit Card Reports Forms About Log Out

Employee Search
tru SSN or EIN

4 records match your search criteria
Show Search Results

Brutest, Davtest
4200 W 115th St, Ste 300
Leawood, KS
Social Security Number: ****0041
Employee Number: FFF440041

Demographics
Debit Card
Dependents
Direct Deposit
Leave of Absence
Insurance Plans
Current Benefit Elections
Future Benefit Elections

Request HSA Account

Davtest Brutest

Address: 4200 W 115th St, Ste 300
Leawood, KS 00011

Home phone: (913) 000-0000

Social security number: ****0041

Date of birth: 01/01/1970

E-mail address: Email@wageworks.com

Form of ID: Driver's License

ID number: ID-123456

Citizenship status: US Citizen

Job title: Sr Business Analyst

Save Changes Cancel

Request HSA Account

After adding a HSA election, the site retains the request account details.

Manage Insurance Plans and Copays

From this page insurance plans and copay grids may be created and maintained. To access these features, select the “**Actions**” tab in the dashboard menu and select “**Manage Insurance Plans and Copays**”. From this screen you will have the ability to edit the plans that are associated with a group. You can define and name the **medical, vision, and dental** plans. For each you may assign a **Copay** list.

Buttons for deleting insurance plans and viewing copay information.

Add Insurance Plan.

From this screen you may customize the type of insurance and give it a custom name.

Add Insurance Plan

Insurance type

Insurance plan name

You will need to add employees to the new insurance plan after saving it.

OK Cancel

Employees will still need to be added to their respective insurance plans. This may be done from the [employee's profile](#).

By assigning a Copay list to an insurance plan you can reduce the number of substantiation requests that are sent to employees. Each Copay created may be named and the dollar amount customized. We recommend only adding Copay amounts that are specified in the **Insurance Plans' Schedule of Benefits and Coverage**. If a \$20.00 Copay is entered under a medical plan an employee on that plan who swipes their card for \$20 at a medical facility will have that claim automatically approved without additional documentation. We do recommend that employees keep documentation handy for their own personal records.

Manage insurance plans and Copays continued...

Copay Amounts for United Healthcare

Add a Copay Add CoPay amount.

Insurance Plan	Claim Type	Amount
United Healthcare	MEDEDUC	\$20.00
United Healthcare	MEDEDUC	\$50.00
United Healthcare	MEDFEE	\$10.00
United Healthcare	MEDFEE	\$15.00
United Healthcare	MEDFEE	\$25.00
United Healthcare	MEDFEE	\$50.00
United Healthcare	MEDFEE	\$65.00
United Healthcare	RX	\$15.00

Add Copay for United Healthcare

Claim type Add CoPay name.

Claim type is required.

Copay amount Add CoPay amount.

Manage MyFlexOnline Messages

The new eFlexOnline portal now has a tool for creating and managing alert and blast messages that can be seen from MyFlexOnline. To navigate here select “**Manage MyFlexOnline Messages**” from the **Actions** tab.

Careful Health Automated Test (913) 111-1111 Dashboard Actions Debit Card Reports Forms About Log Out

Manage MyFlexOnline Messages

Add New Message New messages may be added.

Subject	Message Text	URL Display Name	URL Address	Start Date	End Date	Priority
Enrollment is underway	2018 Open Enrollment is open from October 15th through October 31st. Contact your supervisor with any questions.	-	-	08/01/2018	10/31/2018	1
The deadline for 2018 claims is approaching	March 31, 2019 is the last day for submitting your 2018 claims. To submit a claim through MyflexOnline.com, simply click the "Submit a Claim" button.	-	-	01/01/2019	03/31/2019	1
Test message	Test message	-	-	-	-	2

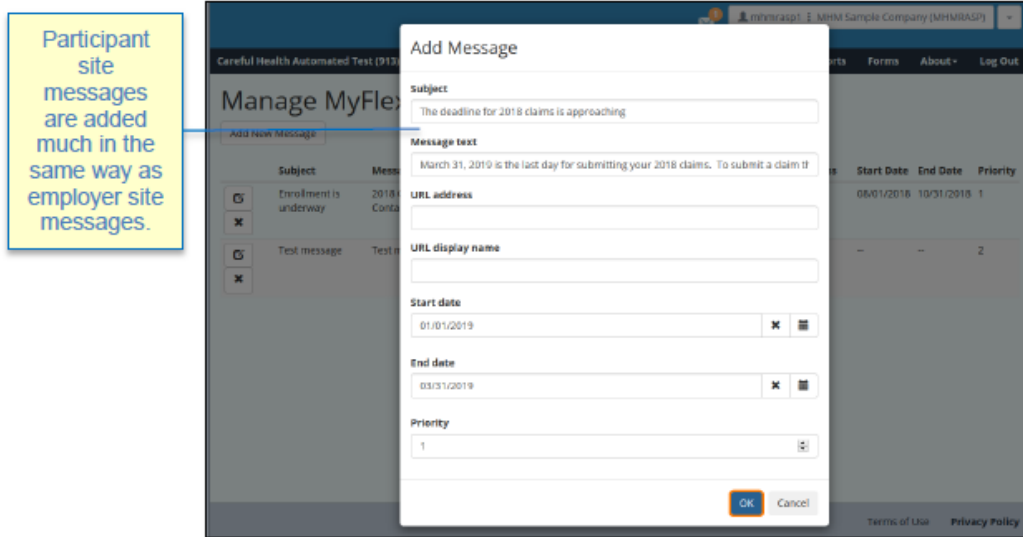
Existing messages may be edited or deleted.

Summary of existing messages.

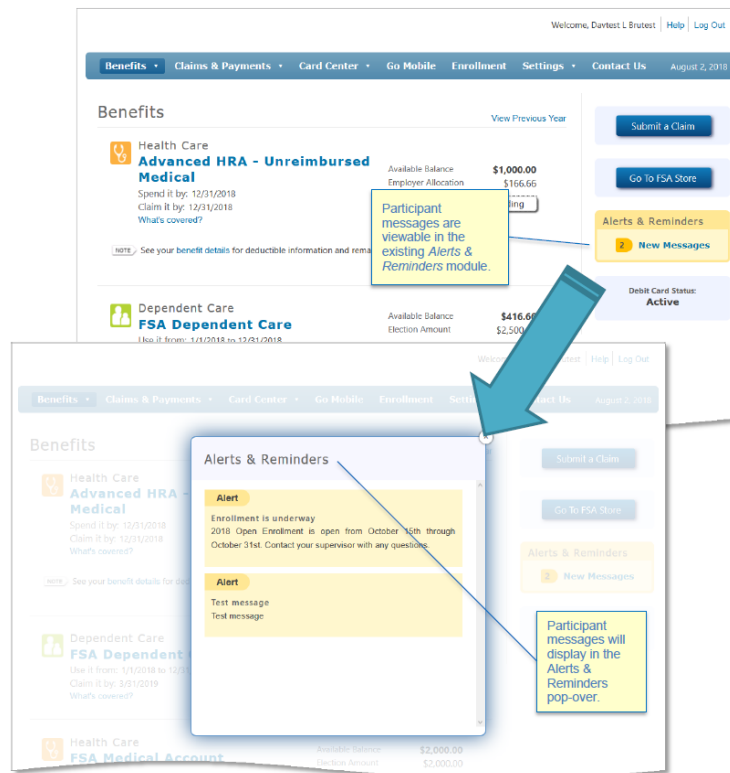
Terms of Use Privacy Policy

Manage MyFlexOnline Messages continued...

In the top left corner of this window you will see a button; **Add New Message**. A new window will pop-up where you can enter the details of your message. This feature may be used for any type of message you desire – Reminders to submit your claims, utilize funds by the plan end/run-out date, or convey other important messages. You will have the ability to set a duration and priority for the message. Priority determines display order. From this page you can also manage or edit existing alerts.



From the **participant portal** the messages are viewable from their **Alerts and Reminders** module.



Manage Users

Administrators can add, edit, and remove users from the portal. When adding a new user, you will need to create their username and provide their email address. *It is important to stay up-to-date with access credentials and remove those who should no longer have access. We recommend having at least two active contacts at a time should a situation arise where one is unable to maintain or access the account.*

The screenshot shows the 'Manage Users' page in the Careful Health system. At the top, there is a navigation bar with 'Dashboard', 'Actions', 'Debit Card', 'Reports', 'Forms', 'About', and 'Log Out'. The main heading is 'Manage Users'. Below the heading is a '+ Add New User' button. A callout box points to this button with the text: 'Add individual employer site user. Adding a new user prompts the creation of the First Time User Registration email.' Below the button is a table with columns for 'User Name', 'E-mail', and 'Administrator'. The table contains two rows: one for 'MHMRerUser' with email 'david.bruning@mhmr.com' and one for 'mhmsample' with email 'mhmsample@mhmr.com'. To the left of each row are three icons: a lock, a pencil, and a trash can. A callout box points to these icons with the text: 'Buttons for password reset, deleting, edit user, and delete user.'

	User Name	E-mail	Administrator
	MHMRerUser	david.bruning@mhmr.com	<input checked="" type="checkbox"/>
	mhmsample	mhmsample@mhmr.com	<input checked="" type="checkbox"/>











Upload files

The **File Exchanger** is identical in functionality to previous versions; however, the layout has been updated. The **File Exchanger** is used to transmit data securely between **eFlexOnline** users. To navigate to this section please select the **Actions** option from the **Dashboard** and click **Upload Files**. You may upload **claims, contribution, enrollment, eligibility,** and **other** files by selecting the appropriate category on the dropdown.

The screenshot shows the 'File Exchanger' page. At the top, there is a navigation bar with 'Dashboard', 'Actions', 'Debit Card', 'Reports', 'Forms', 'About', and 'Log Out'. The main heading is 'File Exchanger'. Below the heading is a 'Upload a File' section. This section includes a 'Category' dropdown menu with 'Other' selected, a 'Description' text area, and a 'File' button with an upload icon and the text 'Select a File to Upload'. A callout box points to the 'Category' dropdown with the text: 'Select the proper category.' To the right of the upload section is a 'Terms of Use' section with three sub-sections: 'Size Limit:' (File uploads are limited to 10 MB per file.), 'File Removal:' (Files are removed from the storage area once they are downloaded.), and 'File Expiration:' (Files that are not downloaded within 5 days are automatically purged from the storage area.). At the bottom left of the upload section is an 'Upload File' button.

View Uploaded Files List

To view previously uploaded files please select the **Actions** option from the **Dashboard** and click **View uploaded files list**. Please note, once a file is downloaded It is removed from the storage area. Files that are not downloaded within 5 days are automatically removed from the storage area.

File Exchanger - Uploaded Files									
	Sender	Name	Category	Description	Expiration Date	Modification Date	Creation Date	Size	Originator
 	MHMRASP	New form.pdf	Other	test	08/08/2018 11:51 AM	08/03/2018 11:51 AM	08/03/2018 11:51 AM	31,391	MHMRASP
 	MHMRASP	NegContExport.txt	Other	tet	08/08/2018 11:51 AM	08/03/2018 11:51 AM	08/03/2018 11:51 AM	87	MHMRASP
 	MHMRASP	HRA.pdf	Other	test	08/08/2018 11:51 AM	08/03/2018 11:51 AM	08/03/2018 11:51 AM	11,401	MHMRASP
 	MHMRASP	Headcount Billing.csv	Other	test	08/08/2018 11:51 AM	08/03/2018 11:51 AM	08/03/2018 11:51 AM	839	MHMRASP
 	MHMRASP	Debit Card Listing.xls	Other	test	08/08/2018 11:52 AM	08/03/2018 11:52 AM	08/03/2018 11:52 AM	34,816	MHMRASP

Buttons to download or remove files.

View claim benefit linkages

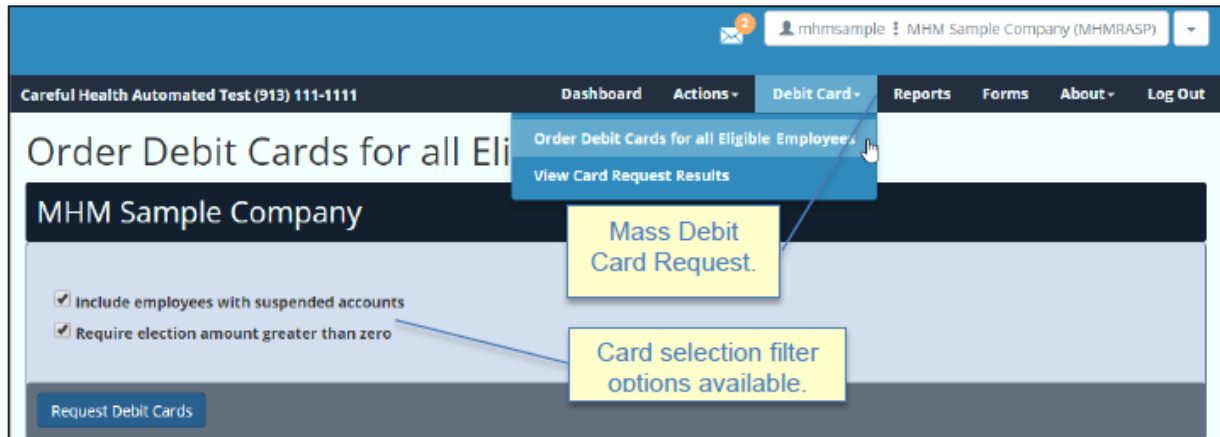
The **Claim Linkage** page has an updated, however the content remains the same. It is primarily used to list the claim types linked to each benefit. To navigate to this section please select the **Actions** option from the **Dashboard** and click **View Claim Type Benefit Linkages**. This page is available to all users regardless of access level.

Claim Type	Linked Benefits
ADOPT	--
DCARDFEE	--
DENCOINS	1. HRA - Comprehensive
DENCOPIAY	--
DENDEDEDUC	1. HRA Dental 2. HRA Dental 3. HRA - Comprehensive
DENEQUIP	1. HRA - Comprehensive
DENFEE	1. HRA - Comprehensive 2. HRA Dental
DEPCARE	1. FSA Dependent Care
GRPINS	--
HSA	--
INDINS	--
MEDCOINS	1. HRA - Comprehensive
MEDCOPIAY	--
MEDDEDEDUC	1. HRA - Comprehensive 2. Advanced HRA - EE Pay 1st 3. Advanced HRA - Unreimbursed Medical 4. Template 7 5. Template 1 and Template 6 6. Template 9 7. Template 4

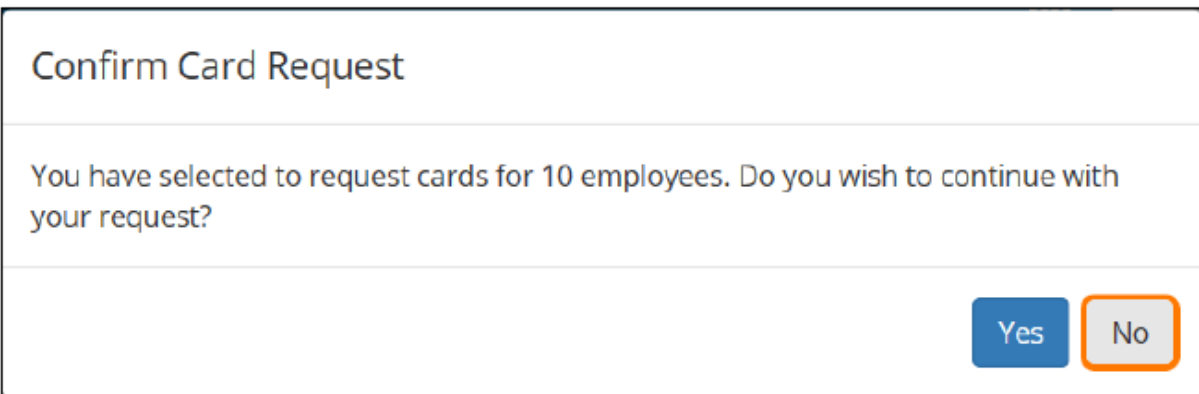
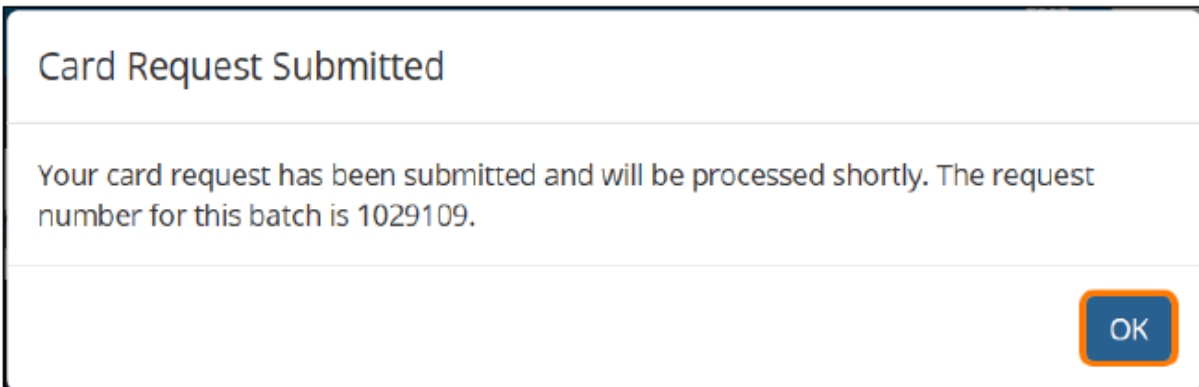
Page is organized by standard claim types, showing linked benefits in pay sequence.

Order debit cards for all Eligible Employees

From the **Dashboard Menu** you select **Debit Card** then **Order Debit Cards for all Eligible Employees**. From there you may order debit cards for all eligible employees in a plan. Cards are generally expected within 7-10 business days and will arrive in separate plain white envelopes. You cannot order a replacement card for a current participant – please direct them to www.myflexonline.com to order their own card or contact **BMS LLC** for assistance.



eFlexOnline will confirm you want to request cards and confirm the order was submitted along with the order number:



View Card Request Results

To view your pending and past requests select **Debit Card** from the **Dashboard Menu**, then **Order Debit Cards for all Eligible Employees**.

Recent Debit Card Orders

Completed	Order Number	Order Date	Ordered By	Total Number of Participant Cards Ordered
Yes	1028964	06/25/18	EFO:mhmsample	99
Yes	1028965	06/25/18	EFO:mhmsample	99
Yes	1028966	06/25/18	EFO:mhmsample	99
Yes	1028967	06/25/18	EFO:mhmsample	99
Yes	1028968	06/25/18	EFO:mhmsample	99

Order number link to expand batch detail

View Card Request Results

View Batch Details, Sort Ascending or Descending

Batch Details

Click on the specific Order Number line from the Recent Debit Card Orders page to view the card details and **download** any special messages into a .CSV (Excel) file. This page will indicate the status of the card and any relevant messages that may have prevented a card from being ordered.

Card Request Details for Batch 1028964

Employee Number	Employee Name	Sort By	Additional Cardholder Name	Request Status	Message
****0811				Failed	Employee's current debit card is not renewable at this time.
****1234				Success	
****1486				Failed	The employee has not made any spending benefit elections.
****2176				Failed	The employee has not made any spending benefit elections.
****2333				Success	
****3333				Failed	The employee has not made any spending benefit elections.
****3612				Failed	The employee has not made any spending benefit elections.
****4887				Failed	The employee has not made any spending benefit elections.
****5170				Failed	The employee has not made any spending benefit elections.
****6035				Failed	The employee has not made any spending benefit elections.
****7478				Failed	The employee has not made any spending benefit elections.

Download CSV Close

Reports

The reports section is organized by report categories. You will notice that the report options have been updated and consolidated from prior versions. You may run and download reports right from the site. From the reports page you will find a **Directory of Reports**. This directory will give you a description and use for each report. Depending on the report you are running you may have different format options: .PDF (**Adobe Acrobat**), .docx (Microsoft Word), xlxs (Microsoft Excel) Flat File, or .CSV (openable in Notepad and Excel).

The screenshot shows the 'Reports' section of the Careful Health website. The top navigation bar includes 'Dashboard', 'Actions', 'Debit Card', 'Reports', 'Forms', 'About', and 'Log Out'. A left-hand sidebar lists various report categories: Company Eligibility, Contribution Reports, Debit Card Reports, and Employee Reports. The main content area is titled 'Report Tips' and contains text explaining how to use the reports, including a 'Directory of Reports' and instructions on export formats. Three callout boxes provide additional information: 'Reports are logically grouped together in a scrollable menu.' points to the sidebar; 'Instructions for running reports.' points to the 'Report Tips' text; and 'Report format selection.' points to the 'Export format' dropdown menu in the 'Employee Statement Report' form.

Report Tips

A list of available reports is shown on the left side of this page. Selecting a report from the list will display a set of options for filtering the report data and for exporting the results.

A **Directory of Reports** is available that contains information about each report and how it's typically used.

When choosing your export format, make sure you have a way to view the report you're saving. For example, if you export using the PDF format, you will need a way to view PDF files in order to see the results. If you're unable to open the file you've exported, you may need to download a viewer such as *Adobe Acrobat*.

When you export your report, it will typically be saved in the download directory used by your browser. If you have trouble locating the report after it downloads, you will have the option to download it again.

You can return to this page by clicking on Reports in the navigation bar.

Instructions for running reports.

Reports are logically grouped together in a scrollable menu.

Employee Statement Report

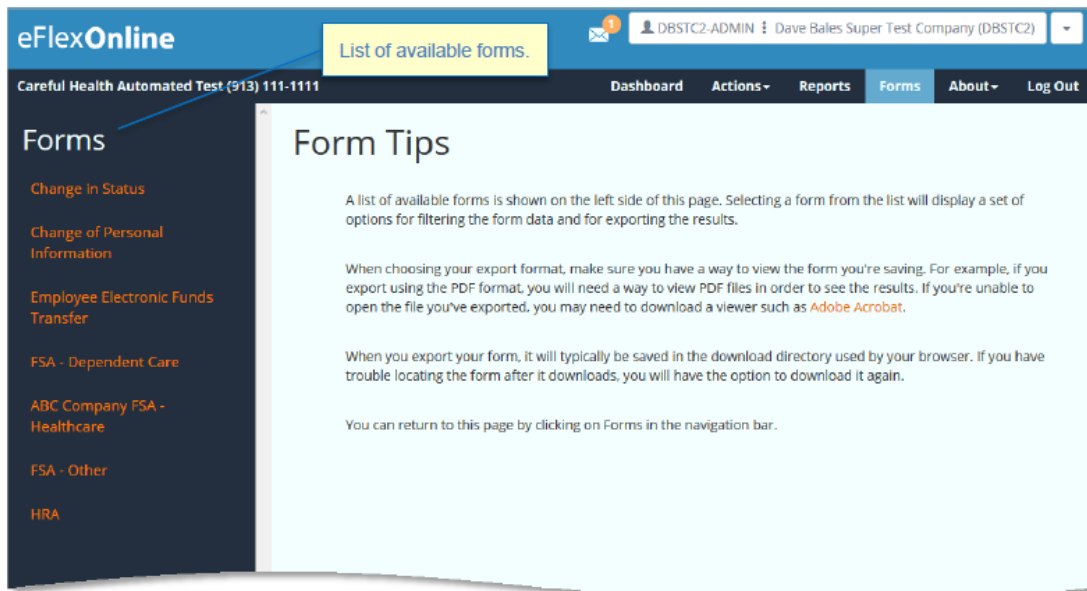
Report name.

Filter options.

Report format selection.

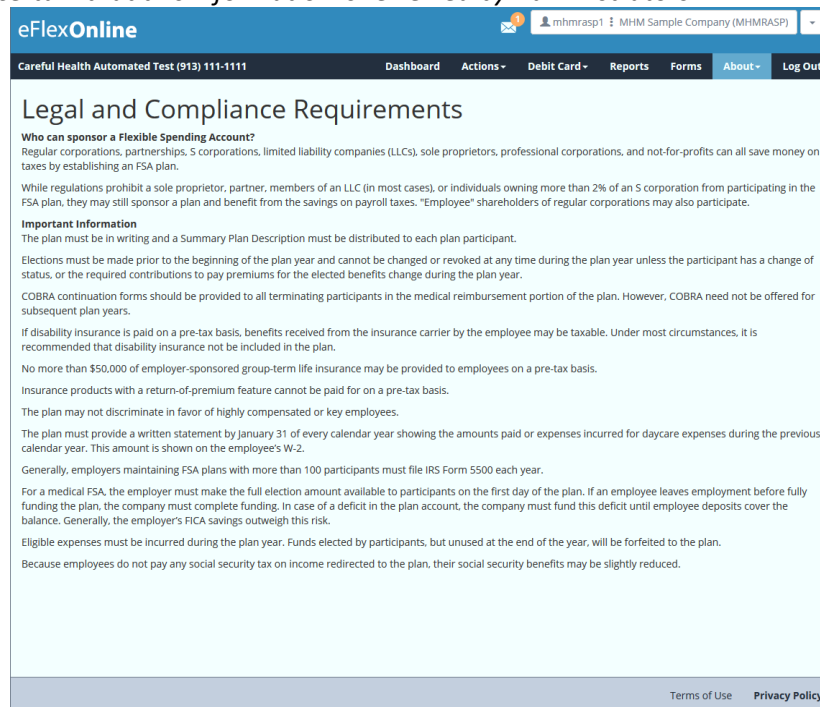
Forms

From the **employer portal** you will see the available forms on the left-hand side. Once a form is selected your browser should automatically begin the download and will either open or save the document depending on your browser's settings. Please ensure that you have a .PDF viewer, such as **Adobe Acrobat** installed on your device.



Legal and compliance requirements

This section contains important information regarding the regulations surrounding the offered benefits and compliance requirements. *Please be certain that this information is reviewed by Administrators.*



Glossary

Benefits Administrator – Refers to the BMS LLC who manages the plan and creates and controls the site and plan content within **eFlexOnline**.

EFO – eFlex/eFlexOnline – Refers to the **employer site**: <https://www.eFlexOnline.com>

Participant Site – MyFlexOnline – Refers to the **participant site**: <https://www.MyFlexOnline.com>

Co Code – Company code – Often referred to as the employer ID. This is the group's unique identifier. Please contact BMS LLC for this information.

HRA – Health Reimbursement Arrangement - An employer funded account that can be utilized for various qualified medical expenses as determined by the employer.

FSA – Flexible Spending Account – An employee funded benefit account that is funded via the employee's payroll. These funds are available up front at the start of the plan year and may be used for IRS approved section 125 items and medical, vision, dental and prescription expenses.

DCA/DCFSA – Dependent Care (Flexible Spending) Account – An employee funded benefit account that is funded via the employee's payroll. These funds are available up front at the start of the plan year and may be used for IRS approved section 125 services to provide care to qualified dependents for the purposes of the employee going to work.

HSA – Health Savings Account – This account is funded by either the employee or the employer and may be used for qualified section 125 IRS expenses. These funds are owned by the employee and are held with a custodial bank.

If you have any questions regarding the above details, please contact BMS LLC directly at (502)244-1161 or (800)919-2674. You can also reach us by email at BMS_Marketing@bmsllc.net. Thank you!